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Prepared by the Senate
Subcommittee on Aging &
Long-term Care

Tax Relief for Senior Renters & Homeowners



Senior Fact Sheet

Aging and Long-Term Care Resources

The resources below will help put you in touch with information about state and area agencies, and private organizations serving the elderly in your community.

- **Area Agency on Aging**

1-800-510-2020

Information and access to your community's comprehensive network of community-based long-term care services.

- **HICAP – Health Insurance Counseling and Advocacy Program**
1-800-434-0222

Provides assistance on questions related to Medicare, Medicare HMOs, Medicare supplements and long-term care insurance.

- **Medicare Office**

1-800-633-4227

- **California Department of Aging**
1-916-419-7500

1300 National Drive, Room 200
Sacramento, CA 95834

- **California Commission on Aging**
1-916-419-7591

California Senior Legislature
Triple-A Council of California
1300 National Drive, Room 173
Sacramento, CA 95834

- **AARP State Office**
1-866-448-3614

1415 L Street, Room 960
Sacramento, CA 95814

- **Senior Legal Hotline**
1-800-222-1753

www.seniorlegalhotline.org

Other important numbers:

- **Area Agency on Aging**

Call this office for comprehensive aging and long-term care related resources, information and referral in our community.
9335 Hazard Way
San Diego, CA 92123
(800) 510-2020

- **APS/Adult Protective Services**

Call this office to report abuse (physical, emotional, financial or neglect) or suspected abuse of older or disabled people.
9335 Hazard Way
San Diego, CA 92123
(800) 510-2020

- **In-Home Support Services**

Call this number if you need assistance with domestic services and you cannot afford to have an assistant.
(800) 510-2020

- **RSVP (Retired Senior Volunteer Program)**

Call this number to find out about our community volunteer programs.
9335 Hazard Way
San Diego, CA 92123
(858) 505-6339

- **Local Welfare Office**

1700 Pacific Coast Highway
San Diego, CA 92101
(619) 515-6770

Property tax and renter assistance programs for older Californians

Homeowners' Property Tax Exemption

Who is eligible:

You must own and occupy your home in California as your principal residence as of January 1 of the year for which you are filing. There are no age or income requirements. You can receive the Homeowners' Property Tax Exemption and Homeowner Assistance during the same year.

How much is exempted:

Contact your county assessor to calculate your exemption. Tax reduction is usually about \$70.

When and where to file:

File with your county assessor's office by February 15 for the prior year. (Your exemption will be less if you file after February 15.) Claim forms and preparation and filing assistance are available from the county assessor's office. There is no need to re-file for this exemption each year, provided you continue to own and occupy the same dwelling each January 1. You can find your county assessor by looking in the phonebook white pages listing under County Government offices.

Homeowner & Renter Assistance

This program provides a once-a-year payment from the State of California to qualified individuals based on part of the property taxes assessed and paid on your home. Renters are qualified based on the part of property taxes they paid indirectly when paying rent. Eligible homeowners may claim up to 139% of the property taxes they paid in the prior year, to a maximum of \$473. You may be eligible to file a claim for the previous year if you are a U.S. citizen, designated alien or qualified alien when you file your claim, and you met the following criteria on December 31 of the year for which you are filing:

- You were 62 years of age or older, blind, or disabled, and
- You owned and lived in your home, or if a renter, you paid \$50 or more per month in rent on that residence and lived in a qualified rented residence in California, and
- You had a total household income of \$40,811 or less.

You may be eligible:

- Even though you received SSI or other public assistance last year.
- Even though you claim the Veterans' or Homeowners' Tax Exemption.
- If you own a mobile home located on land owned or rented by you. (Mobile home owners who must pay license fees may claim either Homeowner Assistance or Renter Assistance, but not both.)

How much help you will receive:

The size of your refund depends upon your household income.

When and where to file:

To receive an application, call the Franchise Tax Board toll-free, 1-800-868-4171, and ask for Form 9000H (homeowners) or Form 9000R (renters). TTY/TTD service for the hearing-impaired is 1-800-822-6268.

Note: Only one homeowner or renter from each household is entitled to the assistance each year. When two or more individuals of a household meet the qualifications for filing a claim as the homeowner, they must decide which one will file the claim.

Property Tax Postponement Law

Allows a person 62 years of age or older, disabled or blind, with a household income less than \$24,000 to postpone all or part of the property taxes on their home. If you filed in prior years when the income limit was \$34,000, you may continue to file under that figure. You must file for each year for which you want postponement.

For claim forms, requests for extensions and dollar limitations, write or call the State Controller, PO Box 942850, Sacramento, CA 94250-5872, or call 1-800-952-5661.

Where to find help

• **Homeowners' Property Tax Exemption:** Contact your County Assessor, listed in the phonebook white pages under County Government offices or visit www.boe.ca.gov/proptaxes/assessors.htm

• **Homeowner and Renter Assistance:** Call the California Franchise Tax Board toll free at 1-800-868-4171, or visit www.ftb.ca.gov

• **Property Tax Postponement:** For claim forms, requests for extensions and dollar limitations, contact the State Controller, PO Box 942850, Sacramento, CA 94250-5872, or call 1-800-952-5661, or visit www.sco.ca.gov/col/taxinfo